

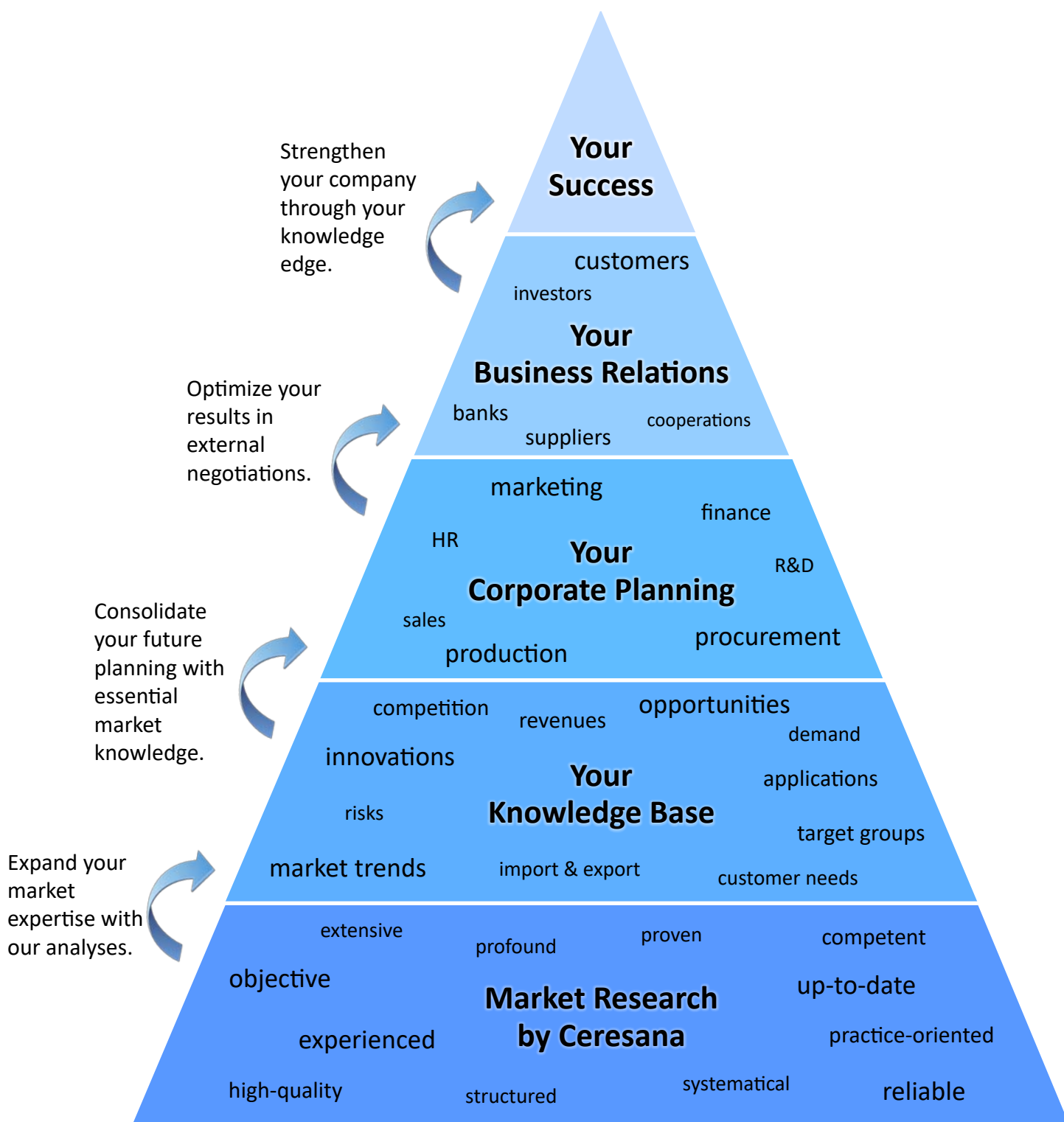
Market Study: Engineering Plastics (4th edition)



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This brochure provides further information on the study “Engineering Plastics (4th edition)”

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Germany (10)
Italy (2)
Spain (1)
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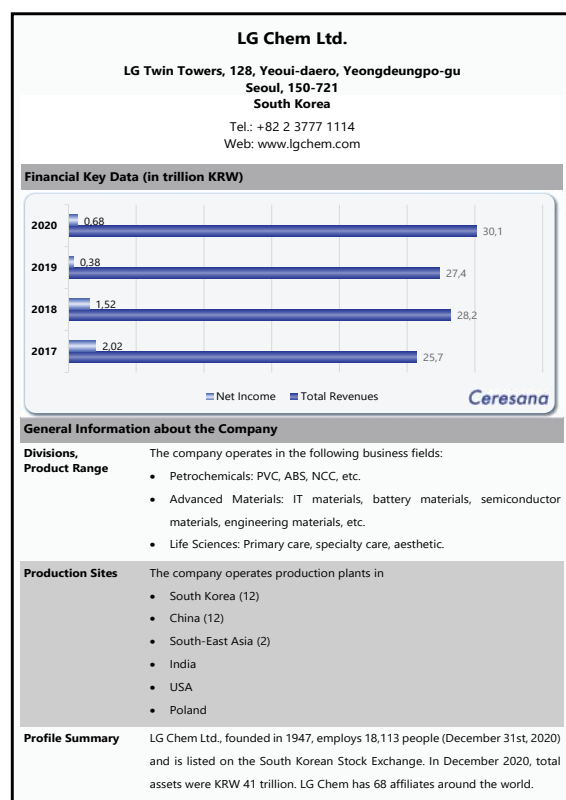
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In 2019, the company established VLBP, a JV with VinFast in Vietnam. The VLBP produces lithium-ion batteries for electric scooters and cars. In the same year, LG Chem became the first Korean chemical company to join the top 10...

Specific Information about Engineering Plastics

Product Details
LG Chem provides different grades of ABS: general purpose, heat resistant, ASA, transparent, flame-retardant, low gloss, anti-scratch, plating, extrusion and blow molding types. Suitable applications include automobiles, home appliances, or IT devices...

Associated Companies
Joint Ventures:

- Ningbo LG Yongxing Chemical Co., Ltd.
JV of LG Chem (75%) and Ningbo Yongxing Chemical Investment Co., Ltd. (25%)
- LG Chem (Huizhou) Petrochemical Co., Ltd.
JV of CNOOC (30%) and LG Chem (70%)

| Production Site – ABS (current) | Capacity (tonnes/year) |
|---------------------------------|------------------------|
| xxx | xxx,000 |
| xxx (JV xxx) | xxx,000 |
| xxx (JV xxx) | xxx,000 |
| Total Capacity (current) | xxx,000 |

| Production Site – SAN (current) | Capacity (tonnes/year) |
|---------------------------------|------------------------|
| xxx | xxx,000 |
| xxx (JV xxx) | xxx,500 |
| Total Capacity (current) | xxx,500 |

| Production Site – PC (current) | Capacity (tonnes/year) |
|--------------------------------|------------------------|
| xxx | xxx,000 |
| Total Capacity (current) | xxx,000 |

| Production Site – ABS (planned) | Start-Up | Capacity (tonnes/year) |
|---------------------------------|----------|------------------------|
| xxxx (JV xxx) | 2021 | +xxx,000 |
| Total Capacity (2021) | | +xxx,000 |

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

Market Study: "Engineering Plastics (4th edition)"

25 Countries, 117 Producers, 450 Pages, 98 Graphs, 205 Tables, 11/2021

Summary

Chapter 1 provides a depiction and analysis of the global market for engineering plastics - including forecasts up to 2030: for each region of the world, demand and production in tonnes and revenues in USD and EUR are explained. In addition, global and regional demand per type of plastic, per application area and the demand for individual products per application are analyzed.

The following products are considered in detail:

- Acrylonitrile butadiene styrene (ABS)
- Polycarbonate (PC)
- Polyamides (PA)
- Polymethyl methacrylate (PMMA)
- Polyoxymethylene (POM)
- Polybutylene terephthalate (PBT)
- Styrene acrylonitrile (SAN)
- Fluoropolymers

Application areas examined in this study are:

- Transportation
- Electrical and Electronics (E&E)
- Consumer Goods
- Construction
- Others

In **Chapter 2**, 25 countries are considered individually. The following is depicted by countries:

- Demand
- Revenue
- Production
- Export & import
- Demand per product
- Demand per application for 19 countries

Chapter 3 provides company profiles of the most important producers of engineering plastics, clearly arranged according to contact details, revenues, profit, product range, production sites, capacities and profile summary. Extensive profiles of 117 manufacturers are provided, e.g. 3M, BASF, Braskem, ChemChina, Covestro, DuPont, LG Chem, LyondellBasell, SABIC, Sinopec, Solvay, Teijin, and Total.

2.3.3 USA

2.3.3.1 Demand and Revenues

In 2020, the demand for engineering plastics in the USA was approximately X million tonnes. The USA thus represents the second largest domestic market after China. We expect the market volume to increase to approx. X million tonnes by 2030. Compared to 2020, this constitutes an average increase of X% per year. In 2020, revenues generated with engineering plastics amounted to around USD X billion. By 2030, we expect this figure to increase to around USD X billion. Compared to 2020, this corresponds to an average increase of X% per year.

| in 1,000 tonnes | 2018 | 2019 | 2020 | 2021p | 2022p | 2023p | 2024p | 2025p | 2030p | 2020-2030p |
|-----------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------------|
| Transportation | X | X | X | X | X | X | X | X | X | X% p.a. |
| E&E | X | X | X | X | X | X | X | X | X | X% p.a. |
| Consumer Goods | X | X | X | X | X | X | X | X | X | X% p.a. |
| Construction | X | X | X | X | X | X | X | X | X | X% p.a. |
| Others | X | X | X | X | X | X | X | X | X | X% p.a. |
| Total | X | X | X | X | X | X | X | X | X | X% p.a. |

Table: Demand for engineering plastics in the USA from 2018 to 2030 – split by applications

| in 1,000 tonnes | 2018 | 2019 | 2020 | 2021p | 2022p | 2023p | 2024p | 2025p | 2030p | 2020-2030p |
|-----------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------------|
| ABS | X | X | X | X | X | X | X | X | X | X% p.a. |
| PC | X | X | X | X | X | X | X | X | X | X% p.a. |
| PA | X | X | X | X | X | X | X | X | X | X% p.a. |
| PMMA | X | X | X | X | X | X | X | X | X | X% p.a. |
| POM | X | X | X | X | X | X | X | X | X | X% p.a. |
| PBT | X | X | X | X | X | X | X | X | X | X% p.a. |
| SAN | X | X | X | X | X | X | X | X | X | X% p.a. |
| Fluoropolymers | X | X | X | X | X | X | X | X | X | X% p.a. |
| Total | X | X | X | X | X | X | X | X | X | X% p.a. |

Table: Demand for engineering plastics in the USA from 2018 to 2030 – split by products

The segment transportation constituted the largest sub-market in 2020. The demand in the segment transportation is expected to develop most dynamically between 2020 and 2030. American GDP decreased by 3.5% in 2020. The government's major stimulus programs have cushioned the worst effects of the crisis. These programs have pumped several trillion USD into society with the result that companies have been able to reduce their financial burden and citizens have been able to keep consumption reasonably high through a one-time payment and increased unemployment benefits. Added to this is a rapid recovery of the industry, which used the government stimulus for efficiency-enhancing measures. Despite challenges posed by a shortage of skilled workers and semiconductor shortages, the economy is growing strongly so that growth will exceed pre-crisis levels in 2021. Government investments in the development of COVID-19 vaccines and in the logistical infrastructure needed for the vaccination campaign, have additionally contributed to the economic recovery. In the long term, economic growth is expected to stabilize again between 1-2%. However, for the near future, production managers, expressed by a production managers' index well above 50%, expect a catch-up effect for the time being and thus increased growth. Even though parts of the U.S. industry have already increased their efficiency, the restructuring wave continues. This means that modern machinery and equipment are in demand. In the same way, there are structural changes in the automotive industry, where electromobility is to be promoted. Although charging infrastructures are lacking, the government has already planned to build them on a large scale.

The building construction sector achieved unexpected growth in 2020 as demand for houses outside the major cities increased massively. This can be seen, among other things, in the growth in the number of building permits for new residential buildings. So far in 2021, residential growth cannot maintain the 2020 level. The forecast for 2022 does not look much more positive. However, the market is expected to stabilize again as of 2023. Housing could get a positive boost from the American Jobs Plan, which is expected to pour several billion USD into public housing. However, since the plan has not yet been approved by the U.S. Congress, it is too early to count on this stimulus. Compensation from non-residential construction is likely to be slow in coming, as hotel and hospitality construction and office construction have not yet emerged from the slump of the pandemic. It is possible that growth will have to come mainly from the...

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